Self Service Benefits Procedures
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Table of Contents
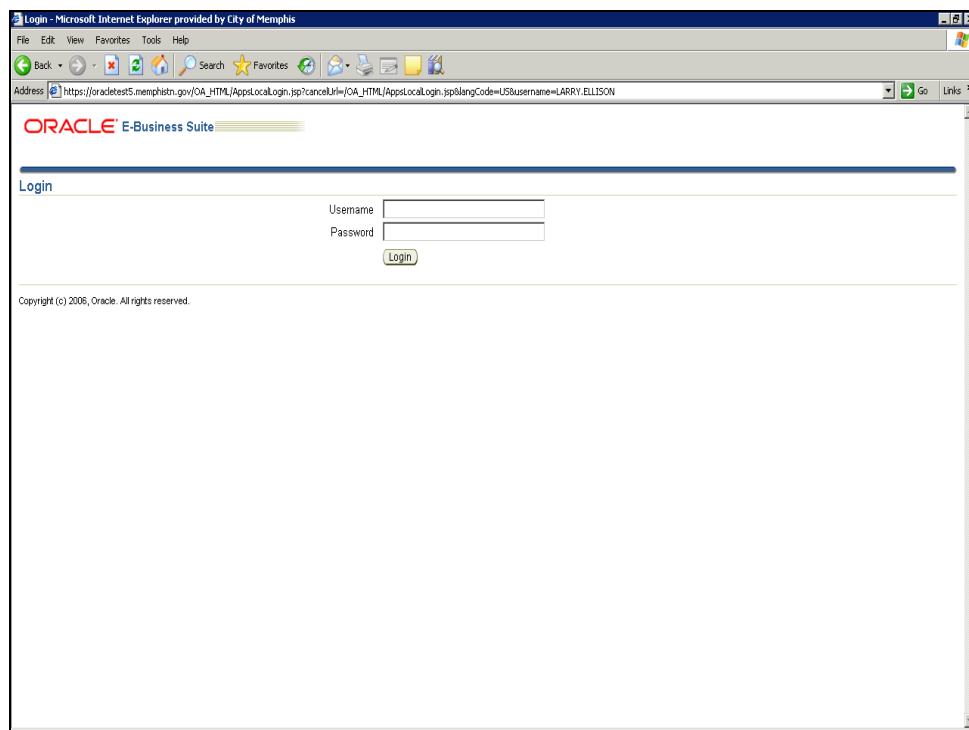
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Self Service Benefits Procedures

Self-Service Benefits - Open Enrollments Demo

Procedure

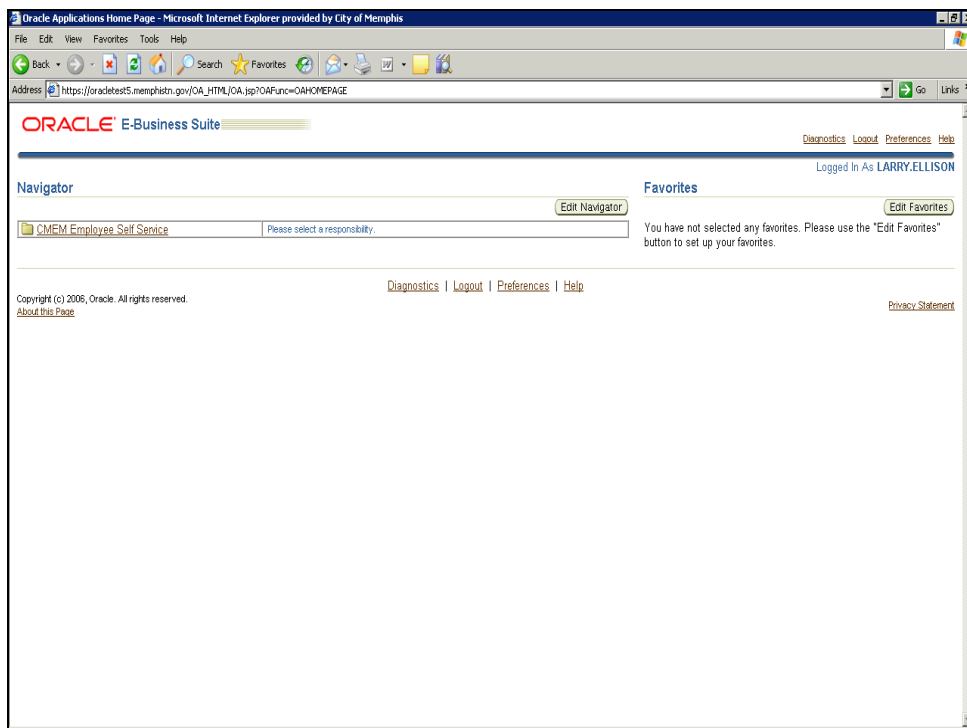**Online Open Enrollment 2010 - Self Service Benefits Demonstration**

This online demonstration will help you make online enrollments during the 2010 Open Enrollment Process. This Process is scheduled for October 12th through October 23rd 2009.
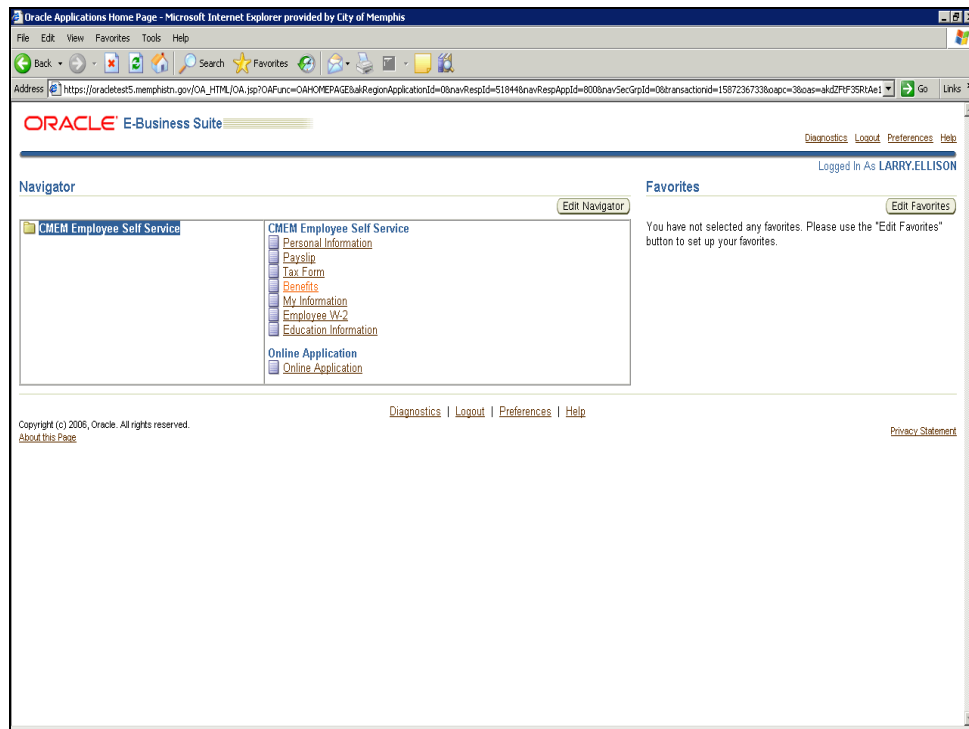**The changes made will be effective January 1st 2010.**

Step	Action
1.	Click in the **Username** field.
2.	If you do not have an Oracle User Account, please login with a user name of 'USER' and password 'PASSWORD', Register yourself to get your own username and password, otherwise please login with your existing user name. We are using a test employee for this Demonstration. Enter the desired information into the **Username** field. Enter a valid value e.g. "**larry.ellison**".
3.	Click in the **Password** field.
4.	Once you enter your password, Click the **Login** button.

Step	Action
5.	Once you are on the Self Service Page, Click the **CMEM Employee Self Service** Link.

Step	Action
6.	Click the **Benefits** link.

Step	Action
7.	On this page, your current Dependents and Beneficiaries are listed. Click on "**Add Another Person**" button and fill-in the required fields and then click "Apply" to add a new Dependents or Beneficiaries. If you do not want to add any new Dependents or Beneficiaries, Please click next. Click the **Add Another Person** button.
8.	Please fill in all the required fields along with any other relevant information, and Click the **Apply** button.

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Step	Action
9.	Click the **Next** Button.

Step	Action
10.	This Page shows all of your current enrollments and deductions. For Pension Information please refer to your payroll stub. This screen shows decline defaults for both Flexible Spending Accounts per the FSA Policy, if you choose to enroll in either of these accounts; you will have to explicitly choose it during this open enrollment process. If you want to change any of your Benefits or enroll in new Benefits Plans, Click the **Update Benefits** button. [Update Benefits]

Step	Action
11.	This page also shows your current enrollments and deductions with default check flags. It also shows all your electable choices. If you want to either change or enroll in new plans, please click the check box corresponding to your desired plan/option. In the current page you can make changes to your Medical or Dental plans, to make changes to your Vision, Life Insurance Plans, please scroll down. As an example in this demo we will select **Dental Primary Pre-Tax Family** option by clicking the the check corresponding to the same. ☐ 1
12.	Please click the **vertical scrollbar**.

Step	Action
13.	If you want to either change or enroll in new Vision and Life plans, please click the check box corresponding to your desired plan/option. On the current page you can make changes to your Vision, Life Insurance (For You), Life Insurance (For Your Spouse and Dependents), and Voluntary Employee, and Voluntary Life Insurance (For Your Spouse/Dependent) plans.
	If you are enrolling in the Life Insurance Contribution plans for the first time or updating your amounts for e.g. Life Insurance (For You) or Life Dep (to designate spouse) or Life Voluntary Employee/Spouse/Dependent plans, you must submit Evidence of Insurability forms. Please download the required certification form from http://openenrollment.memphistn.gov web site.
	To make changes to your Disability and FSA Health Care, FSA Dependent Care Plans, please scroll down. In this demo scenario, we will choose **Vision (Material Only) Pre-Tax Family** option. ☐ 5
14.	For this demo, we will also choose Life Dep plan, please click in the check box adjacent to the Life Dep plan. ☐
15.	To select Life Voluntary Employee plan, click on the check box adjacent to the same. ☐

Step	Action
16.	If you enroll in Life Voluntary Employee, please uncheck the Decline Life Voluntary plan check box. Click the **Decline Life Voluntary** option.
17.	To request a Voluntary Life Insurance amount of your choice, Enter the desired information into the **Life Voluntary Employee** field. Enter a valid value e.g. "**100000.00**".
18.	On this page, Long Term Disability plan is for view only purposes, as this is a free benefit to all the eligible employees. If you want to enroll in the Short Term Disability, please click the check box besides the Short Term Disability plan, you need to submit the evidence of insurability certification, if you are enrolling for the first time. Click the scrollbar.

Step	Action
19.	For this demo purpose, to enroll this employee in Short Term Disability plan, please click the check box corresponding to the same.
20.	In order to enroll in the FSA Plans, please click the vertical scrollbar.
21.	In you choose to enroll in the Health Care Spending Account, please click the check box opposite the Health Care Spending Account.

Step	Action
22.	Now you will select the amount of money you choose to set aside for this account, you will notice that this amount has been defaulted to $200. If you would like to set aside more than the amount that is indicated, please enter the amount of your choice. Your maximum amount to be set aside for this plan is $5000 in increments of $5. Enter the desired information into the **Health Care Spending Account** field. Enter a valid value e.g. "**1000.00**".

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Step	Action
23.	If you choose to enroll in the Dependent Care Spending Account, please click the check box opposite the Dependent Care Spending Account.

Step	Action
24.	Now you will select the amount of money you choose to set aside for this account, you will notice that this amount has been defaulted to $200. If you would like to set aside more than the amount that is indicated, please enter the amount of your choice.
	Your maximum amount to be set aside for this plan is $5000 in increments of $5.
	Enter the desired information into the **Dependent Care Spending Account** field. Enter a valid value e.g. "**500.00**".

Step	Action
25.	Would you like to see your Flexible Spending Account deductions, if so please click the **Recalculate** Button at the bottom of the page. [Recalculate]

Step	Action
26.	If you are not satisfied with the results of your deductions, you may re-enter the coverage amounts, and then click recalculate until your are satisfied with your deductions. Once you have completed this process, you may click the Next Button. Click the **Next to Cover Dependents** button. ![Next]
27.	The current page shows your currently covered and eligible dependents. Please check the "Cover" check box or uncheck the same, to either designate or undesignate any of your dependents. In order to add any new dependents, please click on the Add Dependents Button, and follow the instructions to add new Dependent. But in order to cover the Dependent you will have to submit the required certification to the Benefit's Office. Click Next once you are done with your dependent designation changes, if any. Click the **Next to Update Beneficiaries** button. ![Next]

Step	Action
28.	The current page shows your current Beneficiaries for the respective Life Insurance Plans. You can change the Beneficiary Percentages for your Primary and Contingent Beneficiaries. In order to add any new Beneficiaries, please click on the Add Beneficiaries Button, and follow the instructions to add the new Beneficiary. If you want to donate to your favourate organization, click on the organization button. Click Next once you are done with your Beneficiary designation changes, if any. Click the **vertical scrollbar** to see beneficiaries from other life plans.

Step	Action
29.	Click the **Next to Confirmation Statement** button.
30.	Please be aware of the warning section, which indicates those items that must be completed, you will either have to go back to the sections that are indicated or to present documents to the **City of Memphis Benefits Office**. Click the scrollbar.
31.	Click the scrollbar.
32.	Click the **Confirmation Statement** button.
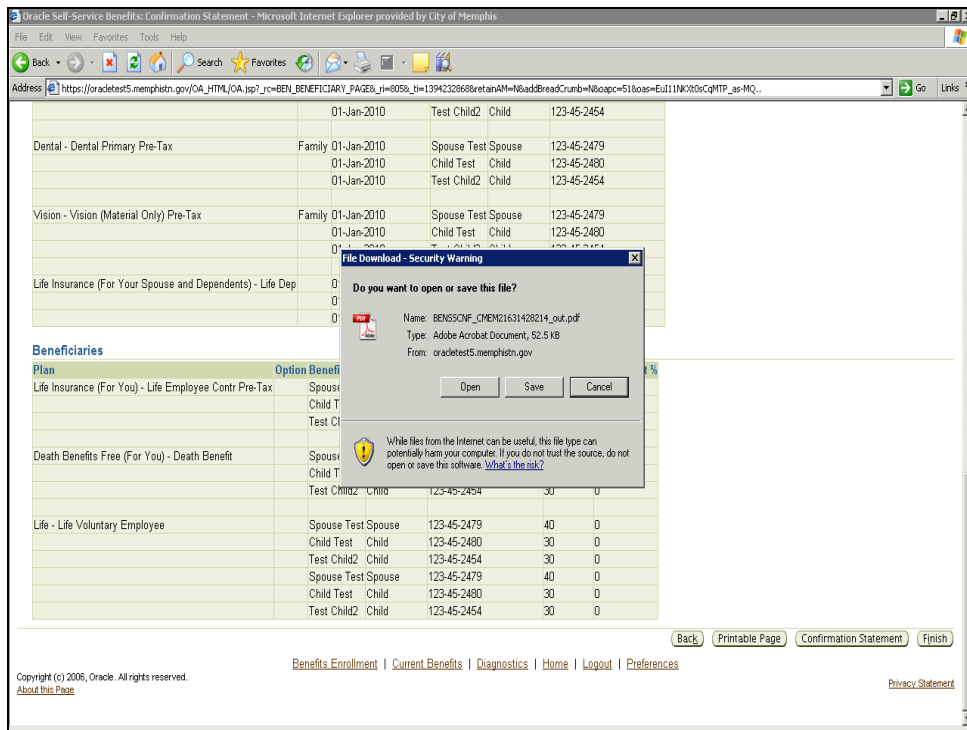
Step	Action
33.	Now you can either open/save to see your Confirmation Statement. Click the **Open** button.

Step	Action
34.	Click the **Vertical Scrollbar** on the Confirmation Statement.

As a result of your Open event on 01-Jan-2010, you have elected the following benefits. Please know that by electing these benefits, you are authorizing deductions with respect to those benefits. Furthermore, you acknowledge that these benefits will remain in effect until the next open enrollment or until you are able to make a change due to a qualifying life event. The benefit listed below will become effective 01-Jan-2010 and continue unless otherwise changed due to a life event.

Plan	Option	Coverage	Coverage Start Date	Employee Pre-Tax Cost	Employee After-Tax Cost
Medical - City of Memphis Basic Pre-Tax(Suspended)	Family		01-Apr-2009	127.93	0.00
Dental - Dental Primary Pre-Tax(Suspended)	Family		01-Jan-2010	17.44	0.00
Vision - Vision (Material Only) Pre-Tax(Suspended)	Family		01-Jan-2010	5.56	0.00
Life Insurance (For You) - Life Employee Contr Pre-Tax		78,000.00	01-Jan-2010	5.46	0.00
Life Insurance (For Your Spouse and Dependents) - Life Dep		10,000.00	01-Jan-2010	0.00	1.07
Death Benefits Free (For You) - Death Benefit		10,000.00	01-Jan-2010	0.00	0.00
Life - Life Voluntary Employee(Interim)		160,000.00	01-Jan-2010	0.00	4.80
Life - Life Voluntary Employee(Suspended)		100,000.00	01-Jan-2010	0.00	3.00
Disability - Long Term Disability		2,600.00	14-Feb-2009	0.00	0.00
Disability - Short Term Disability(Suspended)		300.00	01-Jan-2010	0.00	3.00
FSA Health Care - Health Care Spending Account		1,000.00	01-Jan-2010	41.67	0.00
FSA Dependent Care - Dependent Care Spending Account		500.00	01-Jan-2010	20.83	0.00
			Totals	218.89	11.87

If you have any questions regarding your benefits, please feel free to contact City's Benefits Office at 901-576-6761.

Step	Action
35.	Click the **Close** button on the Confirmation Statement PDF document.

Step	Action
36.	Once you have saved your confirmation Statement, Click the Finish Button to go to the Overview Page, and then click the Logout Button at the top of the Page, to exit Self Service Benefits. Click the **Back to Overview** button. [Finish]
37.	 Click the **Logout** link. [Logout]
38.	**End of Procedure.**